

Conductor[®]
Orchestrating Training

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Chapter 1 - Get the most from Conductor

Welcome

Welcome to Conductor, the comprehensive system for managing and tracking your employees' education. Conductor quickly takes care of the most time-consuming and critical aspects of training. Whether you are matching employees with the training they need, tracking professional licenses and certifications, or producing reports for audits and surveys, Conductor makes it easy! As you get more familiar with this innovative program, you'll find many timesaving features that will enable you to get more done, in less time.

Many organizations fall under the scrutiny of state and federal agencies that are involved in accreditation, safety issues, quality, and funding. A large part of any company's ability to meet the standards of these agencies is providing proof that employees are properly trained, with up-to-date credentials. Conductor is the ideal system for organizing training information, and providing the reports needed for audits and surveys by:

- Internal process auditors
- OSHA
- HCFA
- JCAHO
- ISO
- and many others

Key Features of Conductor

Conductor provides a wide range of benefits to any organization that needs to keep tight reins on its training programs and associated documentation. Conductor offers features not found in other training management systems, and will be a revelation to those of you who were trying to keep track of everything with a spreadsheet.

Features:

- Friendly interface for moving through sections of the program
- Tracks a multitude of information about students and training
- Many built-in reports, with capability to create customized reports
- Instantaneous access to training information
- Course and curriculum design using drag-and-drop
- Familiar Windows file folder interface
- Online LAN class enrollment
- Automatically warns when students are near re-certification dates for licenses and certifications
- Ability to build training plans for specific groups of students based on common factors like location or job duties
- Tracks WBT, CBT and other electronic training automatically
- Advanced ability to filter and sort data
- Password protected access for students and administrators

Overview

Conductor is a set of six training administration programs designed to seamlessly work together through a single, convenient, user-friendly interface. Each program, or screen, serves a specialized function, but they all work together to make training management easy and quick. Conductor also provides a full complement of reports covering all aspects of training administration.

All students that you track with Conductor get their own personalized Student Curriculum screen. This screen allows students to access information related to their training assignments, as well as take Computer Based Training (CBT) from any workstation on a local area network (LAN).

Program Screens

Profile

The Profile screen is where you organize and classify people, at least as far as your training programs are concerned. It is not a full HR package, but it does track and store a lot of information about your employees. In Conductor, we refer to everyone as students, since most people have to take a class or renew a license at one time or another.

Catalog

The Catalog screen is your inventory of training-related items...classes, CBT, licenses, seminars, etc. You can use this screen to track anything. For example, if you need to track the expiration dates of employee health cards, or safety skills, this is where you enter that information.

Compose

The Compose screen is a workspace for creating training templates, or courses. These courses consist of a logical grouping of items that you would assign to an employee for the purposes of gaining a specific body of knowledge, fulfilling a certification requirement, etc. Courses enable the assignment of multiple training items in one step.

Assign

The Assign screen is where training is assigned to students. Courses can be assigned to students either individually, or by groups based on common factors like job description or required skills.

Enroll

The Enroll screen is complementary to the Assign screen. The Enroll screen is used to complete the assignment process by enrolling students in specific sessions (date, time, room, instructor) of a class. Although you may enroll individual students in a class session on the Assign screen, the Enroll screen speeds the enrollment process by showing all open classes and current enrollments from a single, convenient interface.

Credit

The Credit screen is an electronic roll and grade book. It is used for recording attendance and test scores for classes, seminars, and other non-electronic training. Students' performance on CBT or other electronic training can be tracked and recorded automatically.

Student Curriculum

The Student Curriculum screen is the student's interface for accessing his or her training information. Students can view their curricula and progress, and also run any assigned CBT or WBT. If students have been assigned classroom training but are not enrolled in a specific session, they can enroll in the session of their choice from this screen.

Of course, you do not have to use the administrative screens in the order we present them here. However, Conductor is designed to follow the steps that most training managers go through in handling the academic side of training administration.

Chapter 2 - Getting Started

Deciding How To Use and Set Up Conductor

The first step in managing your training is deciding exactly what training information and processes you want Conductor to provide. This step requires nothing more than considering the daily demands placed upon you for information.

Some typical questions you might want to ask yourself: 1. What training and education information do people ask me for the most? 2. What types of information would make my job easier if I could access them anytime I wanted? 3. Which training tasks currently take the most time away from other things I need to be doing?

Below are three responses that could be considered typical for our sample organization: 1. Internal Management, accrediting organizations, payor sources, etc. are constantly asking for proof that all employees are up-to-date on all of their licenses and certifications. 2. If I had access to the education and professional development histories of all our employees, it would be easier for me to schedule the correct number of classes and in services (seminars) we need each month. 3. Tracking all of the different class sessions takes up way too much of my time.

More than likely, your list of things that you want to get out of Conductor will grow as you become more familiar with how it works. As you learn more about its power and flexibility, you will discover more ways it can save you time and make your job easier.

Gathering Information

Once you have decided, at least for now, what information you would like Conductor to provide, you will need to gather the information you are going to put in. Depending on the size of your organization and how centralized (or scattered) your data collection is, this could take up a fair amount of time.

Conductor deals with two main types of data: information about people, and information about training. You probably have most of the information on your staff already entered into an HR or payroll program. If anything takes you a while to find, it will be your training information. Even if you have to start from scratch, don't worry...because with Conductor, entering information is quick and easy.

The following list outlines the basic information you will need to gather or at least have quick access to in order to get started:

- Information about your company's employees. At the very least, you will need the first and last name, and a unique student ID and/or employee number. Even better would be to have more complete information such as address, phone numbers, e-mail address, and information about job functions. A delimited file with the information is your best bet; you can import the information straight into Conductor and save yourself from a fair amount of data entry. More than likely your IS or payroll department can provide this file for you
- Information about the training offered in your organization, which may include:
 - Classes, seminars, and OJT sessions
 - Self-study materials (video and audio tapes, books, etc.)
 - Electronic training (CBT, WBT, simulators, educational games)
 - Training offered outside of your organization that you require employees to take
 - Licenses, certifications, and other professional designations employees are required to maintain

- Anything you else may need or want to track, such as employees' driver's licenses, auto liability insurance, etc.

Filters and Filtering Elements

Conductor boasts the ability to accomplish time-consuming tasks in a very short period of time. Part of its ability to accomplish these tasks, however, is reliant on how well you initially setup Conductor and correlate information. Probably the most important aspect of the initial setup is defining the filters. The filters are key to Conductor's ability to globally assign courses to students based on common factors, and also to its advanced sorting and filtering capabilities.

The reason the filters are so important is the fact that you can associate your students and training to whatever elements you put in them. Say, for example, you need to quickly find all employees at the Main Office that are in the Accounts Receivable department. By associating the appropriate employees to these elements, you can quickly sort them out, even from a staff of thousands. In a related scenario, you need to find all training and requirements needed for employees to maintain a safety certification. By properly linking the different classes, in services, etc. to safety certification, you can isolate these from the rest of your training. Then, you can match the students that must maintain certification with the training they need to keep them up to date.

The four user-defined filters may be setup anyway you want. They work together, but are not hierarchical. In other words, you do not have to turn on filter 3 to use filter 4, or 1 to use 3. They are simply four filters that work together to selectively focus your view.

A logical use for the filters would be to designate one each for Locations, Divisions, Departments, and Positions within your organization. Then for each filter, you would enter in all of the

relevant options. For example, if you were tracking employees in three different buildings, you could have the three buildings as elements in your Location filter. When setting up the filters, keep in mind not only the most obvious, but also the most useful. The set up which most logically organizes your people may not be the best one when it comes to matching training to staff requirements.

Categories

The user-defined categories, or folders, on the Catalog screen, are a convenient way to organize your training tools, licenses, or anything else you want to track. In general the narrower and more precise your categories, the easier it is to locate the exact item you are looking for. Think of this as your filing cabinet of training inventory. Each category, or folder, represents a folder in your cabinet containing the different training items that pertain to one another.

There are many ways to use the categories to organize items on the catalog screen. Listed below are some typical ways to set up Categories:

- Type of Media (video, book, CD-ROM, classroom, self-study)
- Competency/Skill (word processing, customer service, CPR)
- Required License (nursing, stockbroker, electrician)
- Job Track (manager, supervisor, senior sales rep)

Levels of Security

A person in Conductor can be a Student, an Instructor, or an Administrator.

Most of the people in your roster will be Students. These are people who will be assigned training items but are not involved in teaching or administrative functions.

Instructors are people who teach a class in your training program. The main difference between Student and Instructor status is that Instructors' names appear in the Instructor lists on the Session Maestro and Credit screen.

Administrators are those who will be controlling and implementing your training program. These are the only people who can change information in Conductor.

When you designate a person to be an Administrator in Conductor, you are giving him/her the ability to review or change information related to students and training. Many organizations do not think of training information as being sensitive, especially when compared to payroll or other process-related files. But think for a minute about some of the information that Conductor tracks:

- Employees' personal information such as phone, address, e-mail, etc.
- Employees' training history which is a part of their career path/professional development
- Records of how your employees' training complies with regulatory agencies requirements for your industry
- Information on professional licenses and certifications including completion and renewal dates

As you can see, the information contained in Conductor is just as critical and important as that contained in your HR software.

Conductor allows you to set access levels on a screen-by-screen basis. When you first make someone an administrator, that person will have Full access to all screens, with the ability to view, modify, add, or delete information. You then can restrict rights to some or all screens to View Only or Disabled:

- An administrator with the lowest access (all screens Disabled or View Only) will still be able to use Conductor's reporting features
- An administrator with full access to the Profile screen also has full access to filter setup, security features, database utilities, etc.

Chapter 3 - Student Profiles

Profile Screen

The Profile screen is a human resources program specialized for the training process. On this screen you create profiles of the people in your organization using commonly tracked HR data.

In Conductor we consider all people Students, since nearly everyone is required to take a class or renew a certification at one time or another. A person may also be an Instructor or an Administrator depending on his or her function and level of responsibility within your training program.

Creating Profiles is the first step in orchestrating your training.

Creating Profiles

The first step for organizing your training is to create profiles on the Profile screen for all of your students, instructors, and administrators. These profiles consist of commonly tracked HR data, along with information specific to your organization. Entering information is easy...just click in the field and type. After adding the information you want to track, click Save and the profile will be added to the Student Listing.

The following fields must be filled in for Conductor to be able to save a profile on the Profile screen:

- Student ID
- First Name
- Last Name
- Status (Administrator, Instructor, Student)

If you already have much of your data entered into a payroll, HR, spreadsheet or other program, you can use the Import Maestro to create profiles from this information.

Most of the fields on this screen are self-explanatory as far as meaning and function. For more information about the few fields on the Profile screen that have a special meaning consult the help file.

Sorting the Student Listing

The Student Listing displays each student, administrator, and instructor along with his or her Student ID. Conductor gives you the ability to sort the Student Listing by either Last Name or Student ID, in ascending or descending order. Both column headers (Student Listing and Student ID) also serve as sort buttons.

Setting the View Option

The view option allows you to select whether the Student Listing will display Active Students, Inactive Students, Administrators, Instructors, or All. This is useful when you need to isolate a particular subset of profiles in Conductor.

The view that is selected from the View options can work like an additional filtering element. For example, if you set the view for Administrators only then filter the listing by Filters #1 and #4, the listing will display only those Administrators who match both filtering elements.

Adding Photos to Profiles

You may link students' photos to their profiles on the Profile screen if the picture resides either on a local hard drive or your file server. This will allow you to see a student's photo whenever you select him or her from the Student Listing window.

Note: Conductor will accept most picture files including GIF and JPEG images, icons, and bitmaps.

Import Maestro

The Import Maestro allows Conductor to import information about your staff from an existing file such as a spreadsheet or other text file. This file needs to be delimited; in other words, the different fields of data need to be separated from one another by a comma, semicolon, etc. so that Conductor can place the data in the correct fields on the Profile screen.

In most cases, you will use the Import Maestro only during the initial installation of Conductor at your facility; however, you may need to import staff information from a payroll or HR software on a regular basis to keep your profiles up-to-date. For more information on using the Import Maestro please consult the help file.

Chapter 4 - Cataloging Training

Catalog Screen

The Catalog screen is a database of the different classroom sessions, Computer Based Training (CBT) modules, licenses, certifications, seminars/in-services, etc. affiliated with your training program. Because the Catalog screen will let you inventory and track just about anything, these different parts of your training program are referred to simply as Items. These items may also be non-specific to training, but things you still need to track such as driver's licenses and liability insurance renewals.

Adding Catalog Items on the Catalog screen is the second step in orchestrating your training. These items will be used to create courses or templates that you may then assign to your students.

Adding Catalog Items

Adding an item on the Catalog screen is just like creating a student profile. In a sense, you are creating a profile of that particular item using information pertinent to training.

The following fields must be filled in for Conductor to be able to save an item to the inventory on the Catalog screen:

- Description
- Type (Lesson, Assessment, Certification, License, Other)
- Category

For more information about using particular fields on the Catalog screen consult the help file.

Type of Training

When you are adding an item on the Catalog screen, it is important that you choose the correct type from the Type drop-down menu:

- Use Lesson for items which must be completed and tracked (including classroom items with multiple sessions), but which do not have a test or grade associated with them.
- Use Assessment for any items which require the tracking and recording of a test score. If an assessment item is incorrectly cataloged as a lesson, you will not be able to set required certification levels nor record a score for the item.
- Use Certification or License for items which are not training in and of themselves, but are awarded as the result of training (for example, RN license or CPR certification).
- Use Other for miscellaneous items you may choose to track in Conductor.

Categories

The user-defined categories are a convenient way to organize your training tools, licenses, or anything else you want to track. In general the narrower and more precise your categories, the easier it is to locate the exact item you are looking for.

There are many ways to use the categories to organize items on the catalog screen. Listed below are some typical ways to set up Categories:

- Type of Media (video, book, CD-ROM, classroom, self-study)
- Competency/Skill (word processing, customer service, CPR)
- Required License (nursing, stockbroker, electrician)
- Job Track (manager, supervisor, senior sales rep)

Session Maestro

Conductor simplifies the process of adding class sessions to a classroom, seminar, or other item with the Session Maestro. The Maestro allows you to quickly add new sessions as needed, and prevents you from having to enter in an entire item when the only changed information is the date, time, and/or instructor. For more information about adding sessions please consult the help file.

Linking Electronic Training

Conductor gives you the ability to link to a program or document residing on your file server, hard drive, CD-ROM, etc., making that file accessible from the Student Curriculum screen. As long as the student's workstation has the associated program installed they will be able to use Conductor to then launch the program or document.

For example, if you have a Word document your students must read as part of their training program you could link a catalog item to the .doc file. Assuming the student's workstation has Microsoft Word installed they would be able to launch the document from the Student Curriculum Screen. Conductor will automatically track the date the document was last opened and the total time spent reading the document.

Executable files, such as computer based training (CBT) modules, can also be linked in this way. If students then have these items assigned, they can run the module from any workstation on your network.

Chapter 5 - Composing Courses

Compose Screen

The Compose screen is where you build course templates with the items in your catalog (Catalog screen). These templates will consist of at least one topic which has at least one item within. This organizing system of Course, Topic, and Item is based on standard educational concepts and is a convenient way to flowchart courses.

Creating Courses is the third step in orchestrating your training.

You will more than likely create a multitude of specialized courses, based on the continuing education needs of your staff. Conductor makes this task especially easy. Building a template is a simple matter of dragging and dropping the catalog items from the catalog listing onto a flowchart. Once you have built your courses, you are then ready to assign them to your students.

About Courses and Topics

Courses are simply a grouping of training items that together define a desired skill set or series of events. Conductor is flexible in letting you design courses in whatever way works best for your organization. A course can be used to define a series of classes or events during a single day, week, or extended time period. A course can also be used to group training and other events that upon completion will provide the student with a desired competency.

Conductor uses topics to further organize the items within a course, and all courses must have at least one topic. For example, if you are building a course that will give a student basic computer skills like Windows training and word processing, you may want to create two topics, one for each skill gained.

Creating a New Course

Creating a course on the Compose screen is easy and logical. You can create an unlimited number of courses to match the needs of many different groups of students, based on any combination of filtering elements. For example, you may build courses according to specifications required for licensing or certifications related to a student's occupation.

Each course will consist of at least one topic. Each topic will then contain various items that you select from your Catalog.

Setting Prerequisites (Sequentiality) Within a Course

When you are building or assigning courses, you have the option of setting prerequisites, or sequentiality to the items within a topic, or to topics within a course. By setting prerequisites, you are stating that a particular item (or topic) cannot be taken or completed until the item (or topic) previous to it in the flowchart has been completed.

In a course consisting of CBT modules, setting prerequisites on for a module will prevent the student from running the lesson until the module previous to it (the prerequisite) has been completed.

Setting the Required Certification Score

Conductor gives you the option for setting required certification scores when building or modifying a course, and also when assigning a course to students. This flexibility allows you to set the required score for certification on a per student basis when needed. Conductor will then check the student's actual score with the score that is required for certification, and update the educational progress to reflect if certification was achieved.

Note: Certification scores can only be set for items that have their Type set as an Assessment on the Catalog screen.

Chapter 6 - Assigning and Enrolling Students

Assign Screen

The Assign screen is a student registration program designed with the same drag-and-drop interface that makes creating courses so easy. On this screen you can pre-assign training to students, either individually or by group. Conductor allows you to set required certification levels for tests on a student-by-student basis, and also set prerequisites within a course or curriculum.

Assigning Courses is the fourth step in orchestrating your training.

If students have been assigned classroom training, they may also need to be enrolled in a specific class session. Conductor allows you to enroll a student in a specific session on the Assign screen, but also provides the Enroll screen for enrolling multiple students in a session.

Assigning Courses

Students may have several courses assigned to them in order for them to gain the skills and knowledge necessary for their duties, and to further their professional development. After a course is assigned to a student, it is considered to be a part of his or her curriculum. Many students can have the same curriculum. However, Conductor allows you to customize each student's curriculum by adding or removing items from courses, adding or removing prerequisites, and setting different required certification levels.

Note: any time you have mandatory training that certain students must take you will want to create a course (using the Compose screen), and assign that course to the students who require it. By doing this you will be able to run compliance reports on the training items after you have finished giving credit.

Global Course Assignment

Global Course Assignment options allow you to quickly assign a course to a large group of students based on any combination of the four filters. After a global assignment, you may then fine-tune an individual student's curriculum by adding or deleting items as needed.

Global Course Removal

Global Course Removal options allow you to quickly delete a course from the curricula of a large group of students based on any combination of the four filters. Generally, this option is used only to remove a previous global course assignment that is incorrect.

Enroll Screen

The Enroll screen is complementary to the Assign screen; it is used to complete the process of assigning classroom and other session-based training to students by enrolling them in a specific session of an item. The Enroll screen allows you to quickly view all students enrolled in a class session, enroll multiple students in a class session, and move students from one session to another. Although you may enroll individual students in a class session on the Assign screen, the Enroll screen speeds the enrollment process by showing all open classes and current enrollments from a single, convenient interface.

Chapter 7 - Crediting Students

Credit Screen

The Credit screen works much like a teacher's roll and grade book. It performs a wide variety of functions critical to the tracking and recording process. On the Credit screen you track attendance, record test scores, and update certifications and licenses. The Credit screen also allows you to record information for items that are not pre-assigned.

Crediting students for their attendance is the final step in orchestrating your training.

Crediting Students for Attendance

The Credit screen is your electronic roll and grade book for tracking attendance and completion for classroom, OJT, seminars, as well as for noting renewal of licenses and other requirements.

For various reasons, you may need to credit students for completing an item even if it was not previously assigned to them. Your organization may also have unscheduled training events. For example, students may attend an impromptu "lunch bag" seminar for which they can receive contact hours towards a training goal. Conductor makes tracking this kind of training not only possible but easy to do.

Keep in mind, however, for mandatory training in which compliance must be tracked, it is necessary to first assign the item before giving credit. Refer to the Assign Screen/Assigning Courses topic for more information on assigning items.

Chapter 8 - Reports

Overview

Conductor provides over 30 reports on demand, detailing every aspect of your training programs. The information on these reports has been carefully selected to meet the various accrediting and licensing bodies that govern the operations of many businesses. All of the reports are self-explanatory in their purpose, and are partially customizable. Conductor's report compiling and printing capabilities are a huge timesaver for any business, regardless of the extent of your employee education program.

Previewing Reports

By default, Conductor displays reports onscreen using a Report Preview window. From this preview, you can then print out the entire report, or just a section as necessary. The Report Preview Window also allows you to search for specific text within a document. This way you can ensure that the information you want actually is contained in the report you selected.

Customizing Reports

All reports in Conductor are customizable for the purpose of fine-tuning the amount of data to be printed.

The data customizing features include the ability to:

- select an individual student, or students matching a certain set of filtering elements
- select a specific catalog item or class session
- select a specific course
- select a specific instructor

The other customization features include the ability to:

- select a custom date range
- change the title of the report
- add your company's name to the report title
- filter the report data
- group the report data

For more advanced report customization options please contact Sage Corporation.

Chapter 9 - Installation

Installing Conductor

The following are standard procedures for installing any software to your computer, and are necessary for Conductor to install and function properly:

- Turn off your virus protection software because it may interfere with your Conductor installation. To do this, refer to the documentation for your virus protection software. After you install Conductor, re-enable your virus protection software.
- Close any open programs.
Make sure that your system is set to display Small Fonts.
- Insert the CD into the CD-ROM drive. An autorun dialog box will appear. Click Install Conductor.
- If your system is not set to autorun please refer to non-autorun installation below.

Conductor offers 4 types of installations:

- **Complete**

The Complete option is for single users and single PC installations. This option installs the entire Conductor program (database, reports, help files) to the chosen local PC drive.

- **LAN**

The LAN option is for multiple users and PCs regardless of the number of concurrent users. This option installs all Conductor program files and the database in one drive location on the network server. This option is highly recommended for backup, update, and upgrade purposes. Specific LAN installation procedures follow.

- Workstation

The Workstation option is for individual users working within a LAN. After installing Conductor on the LAN, choose the Workstation option to install necessary Conductor files on any PC within the LAN. This installs windows system files and shortcuts for Conductor. The Conductor program, report, and help files and database reside on the LAN. Specific Workstation installation procedures follow.

- Custom

The Custom option is chosen and performed by the System Administrator for retrieval purposes and is therefore not routinely used.

LAN Installation

A network installation places all program, database, report and help files on the chosen network server/driver. Preferably this type of installation will be done along with a workstation install. The LAN installation enables multiple users, or multiple PCs, access to the Conductor program, according to the type of setup purchased.

Follow these steps for a LAN installation:

1. Insert the Conductor CD into the CD-ROM.
2. Click **Next** on the Welcome screen to see the Select Install Type screen.
3. Click the **Lan Setup Install** option.
4. Enter the filepath location on the network server where you want to install Conductor. Or, click the **Browse** button to select an existing folder.
5. Click **Finish**.

Workstation Installation

The workstation installation is necessary with a LAN installation. It installs necessary Windows system files needed to run Conductor. This installation will also create shortcuts for each workstation.

To perform a workstation installation:

1. If it's not in the CD drive already, insert the Conductor CD-ROM into the drive.
2. From *Conductor's Select Install Type* screen, choose **Workstation Install**. This will install only the required system files needed to run the program from the network.
3. When the installation is complete, run Conductor as usual.

Non-Autorun Installation

If your computer is not set up to Autorun, to install Conductor:

1. Place the CD-ROM into your CD-ROM drive.
2. Click on the **Start** button on your Windows taskbar, then click on **Run**.
3. Type X:\Setup\Setup.exe, where X is the name of your drive. CD-ROM drives are usually named D or E.

Chapter 10 - Contacting Sage Corporation

Contacting Sage Corporation

Sage Corporation is a full-service software development company specializing in innovative training and marketing solutions for healthcare organizations, business, and industry. Products and services we offer include:

- Conductor, training administration software
- E-commerce and web based applications
- Custom database applications
- Website design and hosting
- Internet Marketing

We are always interested in hearing any ideas that you may have for improving our products, or discussing any custom software needs. If you have any comments, suggestions, or would like more information about other services we offer, contact us at:

Sage Corporation
PO Box 808
Wrightsville Beach, NC 28480
Phone: 910-509-7475
Fax: 910-509-3181

E-mail: info@sageisland.com
Web: www.sageisland.com

